Wisconsin Skill Standards for Business

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Many dedicated individuals contributed to this guide, and thanks are owed to all of them for their labor, persistence, patience, and expertise throughout the term in which it was conceptualized, drafted, revised, and produced for publication.

The members of the statewide committee that generated the initial ideas for this guide were appointed by State Superintendent John T. Benson in recognition of their knowledge of and interest in effective food service education. The Department of Public Instruction gratefully acknowledges their professional commitment in producing an exciting, innovative activities guide. The committee included the following people:

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Foreword
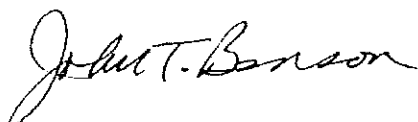
A Letter from the State Superintendent

Wisconsin has long been a model for other states in terms of education quality. However, the world is rapidly becoming a more complex place. As a result, we must expect greater academic and skill achievement from our youth today if they are to be adequately prepared for the challenges of tomorrow.

The only way to ensure that Wisconsin's students have the skills and abilities to be successful in this rapidly changing technological world is to set clear, high academic and skill standards that describe precisely what today's students must learn and be able to do in order to be successful in their adult lives.

The Wisconsin school-to-work business skill standards program were designed in partnership with business and education around the integration of school-based and work-based learning and includes appropriate career development experiences. The skill standards certificates are based on recognized state and national occupational skills. The program provides paid work experience for high school junior or senior students, contributing substantially to their educational and occupational development.

In closing I want to commend the teachers, state agency staff and business, industry and labor partners who gave freely of their time to produce the skill standards for business. I would also like to thank the Governor's Workbased Learning Board and the Wisconsin Technical College Foundation and staff from WIDS for their leadership and technical support.

John T. Benson
State Superintendent

Business activities are such an integral part of the day-to-day routine that most people do not realize the importance or scope of the American business enterprise. While business education's primary mission is to prepare students for business occupations and to teach students about business, **there is an even stronger need to educate all students for and about business, to instill in America's youth and non-traditional students, the basic tenets of small business and entrepreneurship, and to mold a new kind of employee.**

Wisconsin's Business Skill Standards Curriculum is designed to aid the business education instructor, work place mentor, and school to work coordinator, in delivering the standards and to answer the question, "How do I assist my students in achieving these competencies?" These competencies were developed in cooperation with business and industry leaders as well as educators. Supporting activities for specific competencies add to the completeness of instruction and delivery. The Cooperative Education Skills Certification Portfolio can be found online at www.dpi.state.wi.us/dpi/dlsis/let /coopbusi.html

Skill standards are followed by relevant activities; a scoring guide is provided for the activities within each skill standard. The activities reflect state-of-the-art technology and concepts. However, they are only examples and should be used as catalysts for instruction.

The standards are designed to develop students' comprehensive competence. It engages students in the excitement of business and leads them progressively to higher levels of rigor in both school and work based learning.

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Course Information

Target Population

High school junior or senior students whose career goals and abilities can be matched with a suitable workplace.

Prerequisites

1. Each cooperative business skills standards program determines the prerequisite skill necessary before a student can be eligible for the program.
2. There is an expectation that each student will have had career decision-making experiences and will have made an initial selection of a career major before entering the skill standards program.

Course Description

The Wisconsin school-to-work business cooperative skill standards program is designed in partnership with business and education around the integration of school-based and work-based learning and includes appropriate career development experiences. The skill standards certificates are based on recognized state and national business skills. The program provides paid work experience for high school junior or senior students, contributing substantially to their educational and occupational development. The skills (competencies and core abilities) are achieved in related classroom instruction and through learning experiences in the workplace which are mentored and assessed. The workplace affords students the opportunities necessary to achieve both the essential business (technical) competencies and vital employability skills (core abilities) identified by business and industry for success on the job.

Core Abilities

A. Demonstrate basic academic skills

- ☐ you locate written information in documents (reading)
- ☐ you interpret information in documents, such as manuals, graphs, and schedules (reading)
- ☐ you communicate thoughts, ideas, information and messages in writing (writing)
- ☐ you create documents, such as letters, directions, manuals, reports, graphs, and flow charts (writing)
- ☐ you perform basic computations (mathematics)
- ☐ you solve problems after choosing from a variety of mathematical techniques (mathematics)
- ☐ you receive verbal messages and other cues through effective listening (listening)

☐ you attend to messages and other cues by interpreting and/or responding appropriately (listening)

☐ you organize ideas (writing and speaking)

☐ you communicate orally (speaking)

☐ you recognize own potential (career development)

☐ you communicate personal career goals (career development)

B. Use effective personal and interpersonal skills

☐ you demonstrate integrity and honesty

☐ you choose the ethical course of action when faced with a variety of options

☐ you meet expectations of clients or customers

☐ you participate as a contributing member of a team

☐ you use leadership skills

☐ you are effective in teaching new skills to others

☐ you work well with both men and women from diverse backgrounds

C. Apply critical thinking and information processing skills

☐ you communicate information using a computer

☐ you organize and maintain information

☐ you recognize problems and problem situations

☐ you propose plans of action to solve problems

☐ you generate new and/or creative ideas

☐ you acquire and apply new knowledge and skills

D. Relate to the complex interrelationships of systems

☐ you recognize how social, organizational, and technological systems work

☐ you operate effectively within a variety of systems

☐ you select resources for a task that are appropriate to the systems

☐ you work to solve problems that are identified within one of the systems

E. Work with a variety of technologies

☐ you select appropriate equipment for a task, including computers and other technologies

☐ you use the proper procedures when working with a technology

☐ you solve minor equipment-related problems

☐ you follow safety guidelines

Competencies

Unit A—Business Communication

1. Plan a meeting

Criteria—When your performance will be acceptable:

- ☐ you prepare an agenda
- ☐ you notify meeting participants in advance
- ☐ you send agenda to participants prior to meeting
- ☐ meeting is scheduled in an appropriate location
- ☐ you make arrangements for meeting (tables, refreshments, etc.)
- ☐ you prepare documents, handouts, data necessary for the meeting

Conditions—How you will be evaluated:

- ☐ in the workplace and/or school setting
- ☐ given information and instruction from meeting chairperson

Linked Core Abilities

A. Demonstrate basic academic skills
B. Use effective personal and interpersonal skills
C. Apply critical thinking and information processing skills

2. Conduct a meeting

Criteria—When your performance will be acceptable:

- ☐ you utilize parliamentary procedure
- ☐ you follow the agenda
- ☐ you solicit discussion from all members
- ☐ you keep meeting discussions on schedule, as identified in the agenda
- ☐ you speak clearly and distinctly
- ☐ you summarize discussion and verify group decisions
- ☐ you use correct grammar while leading the meeting

Conditions—How you will be evaluated:

- ☐ in the workplace or for a school or community organization
- ☐ after preparing an agenda for a scheduled meeting

Linked Core Abilities

A. Demonstrate basic academic skills
B. Use effective personal and interpersonal skills
C. Apply critical thinking and information processing skills
D. Relate to the complex interrelationships of systems

3. Take minutes for a meeting

   Criteria—When your performance will be acceptable:

   ☐ minutes are typed in an acceptable format

   ☐ minutes are typed error free

   ☐ minutes contain accurate information

   ☐ minutes include motions and actions taken

   ☐ minutes are prepared within established time frame

   Conditions—How you will be evaluated:

   ☐ in the workplace or for a school or community organization

   ☐ for a scheduled meeting

   Linked Core Abilities

   A. Demonstrate basic academic skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

4. **Give an oral presentation**

   Criteria—When your performance will be acceptable:

   ☐ you adapt volume, rate, inflection, and tone to the needs of the audience

   ☐ you use correct grammar throughout the presentation

   ☐ you use vocabulary appropriate to the audience

   ☐ you speak in a clear, concise manner avoiding distracting interrupters

   ☐ you express content of message in an organized pattern that achieves personal goal

   ☐ you demonstrate body language, eye contact, and recognition of personal space appropriate to audience and environment

   Conditions—How you will be evaluated:

   ☐ in the workplace or in a school-related activity or for a community event

   ☐ prepared for a specific purpose and audience

   Linked Core Abilities

   A. Demonstrate basic academic skills

   B. Use effective personal and interpersonal skills

   C. Apply critical thinking and information processing skills

5. Proofread and edit written documents

Criteria—When your performance will be acceptable:

- ☐ you use proofreader's marks
- ☐ you correct errors in grammar and spelling
- ☐ you correct errors in content and word usage
- ☐ you correct errors in formatting
- ☐ you produce a document suitable for use and/or publication

Conditions—How you will be evaluated:

- ☐ in the workplace or school setting
- ☐ provided unedited documents

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

6. Compose written messages

Criteria—When your performance will be acceptable:

- ☐ you compile the information needed
- ☐ you use the writing process: prewrite, draft, edit, publish
- ☐ you organize information in formats appropriate for the intended purposes
- ☐ you use correct grammar, punctuation, and spelling
- ☐ you use appropriate tone, degree of formality, and reading level for the intended audience
- ☐ message is concise
- ☐ message is complete
- ☐ message is courteous
- ☐ you produce a document suitable for use/publication

Conditions—How you will be evaluated:

- ☐ in the workplace or school setting
- ☐ with a need to transmit internal/external message(s)

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

7. **Sort and prioritize mail**

   Criteria—When your performance will be acceptable:

   □ you open and date incoming mail, except personal and confidential mail, according to company policy/procedures

   □ you return incoming mail that has been incorrectly received by the company

   □ you include special instructions for action or response as needed

   □ you distribute incoming mail accurately and promptly to the designated locations, according to company policy/procedures

   Conditions—How you will be evaluated:

   □ in the workplace or in a simulated situation

   □ after receipt of the department's or company's mail

   Linked Core Abilities

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

8. **Select method for sending domestic and international mail**

   Criteria—When your performance will be acceptable:

   □ you identify the most cost- and time-effective method of handling outgoing document/package

   □ you prepare address/shipping label and packaging for outgoing document/package in accordance with organizational procedures and postal regulations

   □ you sort outgoing document/package by size/weight and post accordingly

   □ you maintain records of special mailings

   □ you contact courier to advise of package destination, weight and dimensions, deadline, and schedule pick-up when appropriate

   □ you prepare custom papers if destination is international

   □ you ensure a signed receipt by addressee within established deadline

   Conditions—How you will be evaluated:

   □ in the workplace or simulated situation

   □ given items to be mailed

   Linked Core Abilities

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

9. Use telephone features/equipment for business communications

Criteria—When your performance will be acceptable:

☐ you follow company policy when answering and screening incoming calls

☐ you use correct telephone techniques in placing or returning telephone calls

☐ your conversations are conducted and concluded in a professional and courteous manner

☐ you give appropriate information or requested assistance to the caller or the call is referred to the appropriate individual

☐ you record messages completely and accurately

☐ you document calls according to company guidelines

Conditions—How you will be evaluated:

☐ given several business scenarios in a simulated situation or in the workplace using actual business events

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

10. Fax documents

Criteria—When your performance will be acceptable:

☐ an exact copy and transmission is completed according to specifications

☐ document received is complete and legible

☐ transmission includes clear routing instructions to appropriate individual(s)

☐ confirmation of document sent is logged in journal or filed

Conditions—How you will be evaluated:

☐ in the workplace or in a simulated situation

☐ provided documents to transmit

Linked Core Abilities

E. Work with a variety of technologies

11. Use electronic mail

Criteria—When your performance will be acceptable:

☐ message is transmitted via electronic mail system to intended recipient in accordance with established procedures

☐ message is prepared and transmitted in accordance to generally accepted netiquette guidelines

☐ you regularly monitor mailbox for receipt of e-mail

☐ you save and purge e-mail records according to established guidelines

Conditions—How you will be evaluated:

☐ in the workplace or the classroom

☐ with need to transmit or receive information

Linked Core Abilities

A. Demonstrate basic academic skills

E. Work with a variety of technologies

Unit B—Word and Information Management

1. Store automated or manual records

Criteria—When your performance will be acceptable:

☐ records are kept in a safe, secure environment

☐ storage method permits easy storage and retrieval

☐ records are accessible on demand to designated users

☐ records are updated as needed according to established company procedures

Conditions—How you will be evaluated:

☐ in the workplace

☐ provided with records

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

2. File documents

Criteria—When your performance will be acceptable:

- ☐ documents are accurately indexed according to established procedures
- ☐ documents are accurately sorted and filed, according to established procedures
- ☐ documents are cross-referenced as needed
- ☐ documents are inspected for completeness according to company policy
- ☐ documents are accessible on demand

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ provided documents

Linked Core Abilities

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

3. Retrieve filed documents and integrated media

Criteria—When your performance will be acceptable:

- ☐ documents are retrieved by authorized personnel within prescribed retrieval time
- ☐ documents are accessed following established procedures
- ☐ correct documents are retrieved
- ☐ document distribution is recorded, as required

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ with request for specific documents/media

Linked Core Abilities

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

4. Photocopy documents

Criteria—When your performance will be acceptable:

- ☐ you use features on photocopier to produce single-sided documents
- ☐ you use features on photocopier to produce two-sided documents
- ☐ you collate and staple multi-page documents
- ☐ photocopied document is properly placed on the page
- ☐ photocopied document is of mailable quality (neither too light nor too dark)

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ with a need for copies of documents

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

5. Input documents

Criteria—When your performance will be acceptable:

- ☐ you select most efficient method to input data for the task
- ☐ documents are word processed or typed, scanned, or inputted by voice
- ☐ documents are formatted in an acceptable style, according to company's guidelines
- ☐ you proofread documents
- ☐ you correct errors in documents

Conditions—How you will be evaluated:

- ☐ in the workplace
- ☐ provided information to be inputted

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

6. Produce formatted business letters, memorandums, and reports

Criteria—When your performance will be acceptable:

- ☐ documents are word processed
- ☐ documents contain complete information
- ☐ documents contain accurate information
- ☐ you apply mailability standards to all documents
- ☐ letters are formatted as block, modified block, or simplified style
- ☐ reports are formatted in an acceptable style as required by the organization
- ☐ memos are formatted in a style required by the organization
- ☐ reports include appropriate cover/title page and numbered pages

Conditions—How you will be evaluated:

☐ in the workplace or simulated situation

☐ with a need to communicate information, correspondence, data, etc.

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

7. **Create specialized documents including components such as tables, graphs, and multi-column documents**

Criteria—When your performance will be acceptable:

☐ you apply mailability standards to the documents

☐ tables in documents are centered within text

☐ tables include aligned columns

☐ tables and graphs include headings

☐ graphs (bar, line, pie, etc.) are selected for data following guidelines of the organization

☐ graphs include labeling, key, and/or legend

☐ charts, tables, and graphs include footnotes when necessary

Conditions—How you will be evaluated:

☐ in the workplace or simulated situation

☐ provided information to compile

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

8. **Import text and graphics from other software programs**

Criteria—When your performance will be acceptable:

☐ you use disks or scanner and/or CD-ROM to obtain graphics or text

☐ you crop and/or resizes graphics as necessary

☐ you use copy, cut and/or paste commands of software package

☐ you integrate graphics from other software packages when appropriate

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ given specific purpose/reason to import text

Linked Core Abilities

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

9. Generate business forms

Criteria—When your performance will be acceptable:

- ☐ you use word processing, desktop publishing, or form-generating software package to create form
- ☐ form contains complete information
- ☐ form contains accurate information
- ☐ form meets mailability standards
- ☐ form contains a title
- ☐ form utilizes boxes and lines appropriately
- ☐ form meets layout specifications required by the organization

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation
- ☐ given specific reason to generate form

Linked Core Abilities

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

10. Create documents by merging information

Criteria—When your performance will be acceptable:

- ☐ you integrate information from database and/or spreadsheet into word processing document
- ☐ you integrate chart and/or table into word processing document
- ☐ you create form letters to be used with a database

Conditions—How you will be evaluated:

- ☐ in the workplace or simulated situation

☐ given reason to generate merged document

☐ using existing database and/or spreadsheet

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

11. Print documents or specific pages

Criteria—When your performance will be acceptable:

☐ you select appropriate printer for the computer

☐ you accurately print specific pages of a multi-page document

Conditions—How you will be evaluated:

☐ in the workplace or simulated situation

☐ given instructions to print specific pages/documents

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

12. Generate newsletters, brochures, programs, or invitations

Criteria—When your performance will be acceptable:

☐ you use desktop publishing software to produce the specialized document

☐ publication meets layout specifications required by the organization

☐ you use desktop publishing software to produce a bi-fold or tri-fold publication

☐ publication meets mailability standards

☐ publication includes text and graphics

☐ publication includes multiple fonts and/or styles

☐ publication contains complete information

☐ publication contains accurate information

Conditions—How you will be evaluated:

☐ in the workplace

☐ as requested or needed by the organization

☐ using information from the publisher

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

13. **Export files**

Criteria—When your performance will be acceptable:

☐ you save files to a disk

☐ you save files to a hard drive

☐ you attach file to an e-mail

☐ you move file to another existing file

Conditions—How you will be evaluated:

☐ in the workplace or simulated situation

Linked Core Abilities

C. Apply critical thinking and information processing skills

E. Work with a variety of technologies

14. **Use a variety of resources to obtain information**

Criteria—When your performance will be acceptable:

☐ you use appropriate techniques to locate information for a specific purpose

☐ you evaluate appropriateness of information

☐ you evaluate relevancy of materials

☐ you determine validity of information

☐ you evaluate credibility of source

☐ you synthesize information from resources to complete a specific task.

Conditions—How you will be evaluated:

☐ in the workplace

☐ as requested or needed

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

E. Work with a variety of technologies

Unit C—Financial Recordkeeping

1. Operate a calculator

Criteria—When your performance will be acceptable:

☐ you manipulate 10-key number pad by touch, according to pre-established speed and accuracy standards

☐ you use special features of electronic calculator to perform calculations and/or verify calculations

☐ calculations are accurate

☐ you replenish paper and ink supply, as needed

Conditions—How you will be evaluated:

☐ in the workplace or classroom

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

2. Complete expense reports

Criteria—When your performance will be acceptable:

☐ you complete expense reports following the organization's guidelines

☐ expense report includes claim for at least two of the following: meals, transportation, lodging, registration or other expenses

☐ expense report contains accurate information

☐ expense report contains complete information

☐ reimbursement claims are calculated accurately

☐ expense report is submitted, meeting the timeline requirements of the organization

Conditions—How you will be evaluated:

☐ in the workplace or simulated situation

☐ given expenses for an employee(s) of the organization

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

3. **Design a database**

   Criteria—When your performance will be acceptable:
   - ☐ you create a database with at least three fields
   - ☐ you select appropriate data fields for the database
   - ☐ you select appropriate field width
   - ☐ you name fields in a database

   Conditions—How you will be evaluated:
   - ☐ in the workplace or classroom
   - ☐ given need for designing database

   Linked Core Abilities
   - A. Demonstrate basic academic skills
   - B. Use effective personal and interpersonal skills
   - C. Apply critical thinking and information processing skills
   - D. Relate to the complex interrelationships of systems
   - E. Work with a variety of technologies

4. **Modify or delete database records**

   Criteria—When your performance will be acceptable:
   - ☐ you append, change, and delete fields as necessary
   - ☐ you append, change, and delete records as necessary
   - ☐ you rename a field as necessary
   - ☐ you reorganize fields in database as necessary

   Conditions—How you will be evaluated:
   - ☐ in the workplace or simulated situation
   - ☐ with request or need for database modification

   Linked Core Abilities
   - A. Demonstrate basic academic skills
   - C. Apply critical thinking and information processing skills
   - D. Relate to the complex interrelationships of systems
   - E. Work with a variety of technologies

5. **Organize data using multiple database**

   Criteria—When your performance will be acceptable:

   ☐ you retrieve data from more than one database

   ☐ you query for specific and relevant data as requested

   ☐ you logically organize requested data fields

   ☐ data is labeled appropriately

   Conditions—How you will be evaluated:

   ☐ in the workplace

   ☐ provided several databases

   ☐ with a request or need to organize data

   Linked Core Abilities

   A. Demonstrate basic academic skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

6. **Prepare financial statements**

   Criteria—When your performance will be acceptable:

   ☐ you prepare post-closing trial balance to ensure that debits equal credits prior to preparing financial statement

   ☐ you use data from worksheet to compile data for income statement and balance sheet

   ☐ you prepare financial statements (income statement, balance sheet) that are accurate

   ☐ you format financial statements, using generally accepted practices

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom using simulated business information

   ☐ given data to complete worksheet

   Linked Core Abilities

   A. Demonstrate basic academic skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

7. **Use mathematical calculation features within spreadsheets**

   Criteria—When your performance will be acceptable:

   ☐ you enter appropriate formulas into specific cell(s) to manipulate variable data as needed

   ☐ you use correct symbols for addition, subtraction, multiplication, and division

   ☐ you use parentheses correctly to indicate hierarchy of mathematical computations

   Conditions—How you will be evaluated:

   ☐ in the workplace or simulated situation

   ☐ when required to make calculations

   Linked Core Abilities

   A. Demonstrate basic academic skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

8. **Use spreadsheet applications to analyze and make decisions**

   Criteria—When your performance will be acceptable:

   ☐ learner creates spreadsheet for a specific purpose

   ☐ learner creates spreadsheet to manipulate variable data

   ☐ spreadsheet is organized in a logical, sequential manner

   ☐ learner appropriately labels and formats cells

   Conditions—How you will be evaluated:

   ☐ in the workplace or simulated situation

   Linked Core Abilities

   A. Demonstrate basic academic skills

   B. Use effective personal and interpersonal skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

Unit D—Business Procedures

1. Apply organizational and time management skills

Criteria—When your performance will be acceptable:

- ☐ you set goals for organizing work and managing time
- ☐ you identify tasks to be completed
- ☐ you prioritize tasks, according to established guidelines
- ☐ scheduled tasks are completed in a logical sequence
- ☐ scheduled tasks are completed within the time limits specified
- ☐ you maintain a planning calendar
- ☐ you regularly evaluate progress/status of scheduled tasks

Conditions—How you will be evaluated:

- ☐ in the workplace and in the classroom
- ☐ as tasks are scheduled

Linked Core Abilities

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

2. Outline the roles of support staff, supervisors, managers, and technology in achieving business goals

Criteria—When your performance will be acceptable:

- ☐ you explain the advantages and disadvantages of centralization and decentralization of an organization
- ☐ you identify levels of management
- ☐ you identify decision-making authorities
- ☐ you describe line versus staff departments
- ☐ you describe methods used by management to communicate with employees
- ☐ you explain the importance of timely communication of information pertinent to employees
- ☐ you describe the role of technology in the overall management process

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

3. **Outline the concepts that guide small business operations**

   Criteria—When your performance will be acceptable:
   - ☐ you explain characteristics of a successful entrepreneur
   - ☐ you identify costs associated with becoming an entrepreneur
   - ☐ you describe advantages and disadvantages of owning a franchise
   - ☐ you identify the difference between a sole proprietorship and a partnership
   - ☐ you identify major components of a business plan
   - ☐ you define what is needed (material, labor, etc.) to start a given business
   - ☐ you identify basic records needed by a business
   - ☐ you project the total cash needed to start a business (start-up, operational expenses and cash reserves)
   - ☐ you examine a profit/loss statement to determine if a business is profitable
   - ☐ you describe the role government plays in small business
   - ☐ you give an example of a license that a small business must obtain

   Conditions—How you will be evaluated:
   - ☐ in the classroom

   Linked Core Abilities
   - A. Demonstrate basic academic skills
   - B. Use effective personal and interpersonal skills
   - C. Apply critical thinking and information processing skills
   - D. Relate to the complex interrelationships of systems

4. **Make national and international travel and travel-related arrangements**

   Criteria—When your performance will be acceptable:
   - ☐ arrangements include working with a travel agency
   - ☐ you arrange for a car rental
   - ☐ you arrange hotel reservations
   - ☐ you prepare an itinerary
   - ☐ itinerary accommodates the time necessary for travel, meetings, appointments, etc.
   - ☐ itinerary contains complete information
   - ☐ itinerary contains accurate information
   - ☐ you arrange airline reservations
   - ☐ you arrange for pickup or delivery of airline tickets
   - ☐ you identify purpose of a passport
   - ☐ you identify procedures and documents necessary for securing a passport
   - ☐ you calculate time difference between home city and specific cities in USA
   - ☐ you calculate time difference between home city and specific foreign cities

- ☐ you identify currency used in specific foreign countries
- ☐ you identify documents necessary to enter a specific country

Conditions—How you will be evaluated:

- ☐ given description of a travel situation(s) or in the workplace with an actual travel need

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

5. Plan a business luncheon

Criteria—When your performance will be acceptable:

- ☐ you establish purpose for luncheon
- ☐ you set date and time for luncheon
- ☐ you plan an agenda
- ☐ you select location
- ☐ you select a menu
- ☐ you create invitations, place cards, and menu
- ☐ you greet guests as they arrive
- ☐ you MC the luncheon

Conditions—How you will be evaluated:

- ☐ in the classroom and/or in the workplace

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

Unit E—Accounting (Specialty Area)

1. Record business transactions in a journal

Criteria—When your performance will be acceptable:

- ☐ you use appropriate source documents to accurately record business transactions in appropriate journals
- ☐ journal entries contain complete, accurate information (date, amounts, account titles, source reference)
- ☐ you prove that debits equal credits
- ☐ you appropriately correct errors

Conditions—How you will be evaluated:

- ☐ in the workplace or classroom using simulated business situations
- ☐ given transaction source documents

Linked Core Abilities

C. Apply critical thinking and information processing skills

2. Open accounts in a general and subsidiary ledger

Criteria—When your performance will be acceptable:

- ☐ accounts are accurately labeled according to generally accepted practices
- ☐ accounts are categorized accurately according to generally accepted accounting practices

Conditions—How you will be evaluated:

- ☐ in the workplace or classroom using simulated business situations
- ☐ given ledgers

Linked Core Abilities

C. Apply critical thinking and information processing skills

3. Post amounts from a journal to a general or subsidiary ledger

Criteria—When your performance will be acceptable:

- ☐ you accurately post journal entries to appropriate ledgers
- ☐ you prepare a trial balance to verify that debits equal credits
- ☐ you prepare appropriate schedules to verify accuracy of subsidiary ledgers
- ☐ your entries are complete with correct posting reference notations

Conditions—How you will be evaluated:

- ☐ in the workplace or classroom using simulated business situations
- ☐ given journal(s) with balanced entries

Linked Core Abilities

C. Apply critical thinking and information processing skills

4. Make adjustments to a worksheet

Criteria—When your performance will be acceptable:

- ☐ you accurately analyze adjustment transactions to comply with accepted procedures
- ☐ you accurately journalize and post adjustment entries
- ☐ you verify that debits equal credits
- ☐ worksheet contains data needed to prepare an income statement and balance sheet

Conditions—How you will be evaluated:

- ☐ in the workplace or classroom with simulated business situations
- ☐ provided with worksheets and request/need for adjustments

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

5. Complete a payroll register

Criteria—When your performance will be acceptable:

- ☐ you accurately calculate gross pay, withholding, authorized deductions, and net pay
- ☐ register is complete with correct employee personal data, dates, hours, salary, and deduction information
- ☐ you verify accuracy of register
- ☐ you journalize and post payroll transactions accurately

Conditions—How you will be evaluated:

- ☐ in the workplace or classroom using simulated pay period information
- ☐ using employee payroll data

Linked Core Abilities

C. Apply critical thinking and information processing skills

6. **Account for uncollectible accounts and receivables**

   Criteria—When your performance will be acceptable:

   ☐ you estimate bad debts expense, according to established procedures

   ☐ you accurately record, adjusting entry for bad debts expense at the end of the fiscal period

   ☐ you record journal entries for uncollectible accounts receivables, according to established procedures

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom using simulated business situation

   ☐ given request for adjustment at end of fiscal period

   Linked Core Abilities

   C. Apply critical thinking and information processing skills

7. **Record entries for accrued revenue and accrued expenses**

   Criteria—When your performance will be acceptable:

   ☐ you accurately record adjusting entries for accrued revenue and accrued expenses according to established procedures at the end of the fiscal period

   ☐ you verify that debits equal credits

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom using simulated business situation

   ☐ given request for adjustment at end of fiscal period

   Linked Core Abilities

   C. Apply critical thinking and information processing skills

8. **Journalize the declaration and payment of a dividend**

   Criteria—When your performance will be acceptable:

   ☐ you accurately journalize and post a transaction on the date of dividend declaration

   ☐ you accurately journalize and post a transaction on the date of a dividend payment

   ☐ you journalize and post only as authorized

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom using simulated business situation

   ☐ given declaration of dividend

   Linked Core Abilities

   C. Apply critical thinking and information processing skills

9. **Maintain files in automated accounting systems**

   Criteria—When your performance will be acceptable:

   ☐ you access specific data upon request

   ☐ you generate specific financial records/documents as needed

   ☐ you input data accurately as authorized

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom using simulated business situation

   ☐ with request/need to input and/or access data

   Linked Core Abilities

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

10. **Design spreadsheets for accounting applications**

    Criteria—When your performance will be acceptable:

    ☐ spreadsheet is accurate

    ☐ spreadsheet is free of unnecessary computer commands

    ☐ spreadsheet is appropriately formatted to meet data requirements

    ☐ spreadsheet data is used to prepare and generate charts and graphs for use in analyzing financial conditions of a business

    ☐ spreadsheet is used to evaluate impact of changes in accounting methods

    Conditions—How you will be evaluated:

    ☐ in the workplace or classroom using simulated business situation

    ☐ with request/need for spreadsheet

    Linked Core Abilities

    A. Demonstrate basic academic skills

    C. Apply critical thinking and information processing skills

    E. Work with a variety of technologies

11. **Record entries to account for plant assets and depreciation**

    Criteria—When your performance will be acceptable:

    ☐ you accurately calculate annual estimated depreciation expense of plant asset according to established guidelines

    ☐ you accurately maintain plant asset record according to established guidelines

    ☐ you accurately journalize and post depreciation expense at end of fiscal period

Conditions—How you will be evaluated:

☐ in the workplace or classroom using simulated business situation

☐ with request for adjustment at end of fiscal period

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

Unit F—Technology (Specialty Area)

1. Demonstrate multi-media applications

Criteria—When your performance will be acceptable:

☐ you create a linear presentation using technology

☐ you create a non-linear presentation using technology

☐ you incorporate audio, video, text, and graphics in presentation

☐ you make a presentation to an audience using a multi-media product

☐ you transfer multi-media presentation to video

☐ you use appropriate public speaking skills during presentation

Conditions—How you will be evaluated:

☐ in the workplace or classroom

☐ for special purpose for using multi-media application(s) is appropriate

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

2. Recognize errors or inefficiencies in technological functions

Criteria—When your performance will be acceptable:

☐ you apply procedures used to restart and recover from a system failure

☐ you identify procedures to use when a computer virus is detected

☐ you follow security plans for information systems

☐ you identify disaster prevention and recovery procedures

Conditions—How you will be evaluated:

☐ in the workplace or the school setting

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

3. **Customize software applications**

   Criteria—When your performance will be acceptable:

   ☐ you create a template for use of multiple records

   ☐ you create macros

   ☐ you adjust defaults of software program to meet different needs

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom

   Linked Core Abilities

   A. Demonstrate basic academic skills

   B. Use effective personal and interpersonal skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

4. **Perform advance file maintenance, such as expanding and compressing files**

   Criteria—When your performance will be acceptable:

   ☐ you recognize file formats

   ☐ you save graphic files on appropriate medium

   ☐ you perform file compression

   ☐ you create subdirectories

   Conditions—How you will be evaluated:

   ☐ in the workplace or classroom

   Linked Core Abilities

   A. Demonstrate basic academic skills

   B. Use effective personal and interpersonal skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

5. **Solve problems related to the operation of computer equipment**

   Criteria—When your performance will be acceptable:

   ☐ you unjam paper in printer

   ☐ you recognize need for new printer ribbon or toner cartridge

   ☐ you hook up cables for keyboard, mouse, and/or monitor to processor unit

   ☐ you hook up printer cable to computer

   ☐ you use monitor controls to correct vertical/horizontal scrolling

   ☐ you use monitor controls to correct screen intensity

   Conditions—How you will be evaluated:

   ☐ in the workplace when presented with equipment problems and/or in a simulated situation

   Linked Core Abilities

   A. Demonstrate basic academic skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

6. **Suggest a program for care of computer equipment**

   Criteria—When your performance will be acceptable:

   ☐ you identify virus scan programs

   ☐ you identify use of utility programs

   ☐ you identify procedures used to restart and recover from a system failure

   Conditions—How you will be evaluated:

   ☐ in the workplace or in a simulated situation

   Linked Core Abilities

   A. Demonstrate basic academic skills

   B. Use effective personal and interpersonal skills

   C. Apply critical thinking and information processing skills

   D. Relate to the complex interrelationships of systems

   E. Work with a variety of technologies

7. **Use the Internet to obtain information**

   Criteria—When your performance will be acceptable:

   ☐ you conduct key-word search for relevant information following established procedures

   ☐ you save and print Internet information according to established procedures

   ☐ you appropriately cite sources obtained through Internet

   ☐ you utilize bookmarks following established procedures

Conditions—How you will be evaluated:

☐ in the workplace and/or in the classroom

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

8. **Access an electronic bulletin board**

Criteria—When your performance will be acceptable:

☐ you download authorized software, according to established guidelines

☐ you make connection with appropriate bulletin board service

☐ you make connection with appropriate authorization

Conditions—How you will be evaluated:

☐ in the workplace and/or in the classroom

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

E. Work with a variety of technologies

9. **Use image scanners to input data**

Criteria—When your performance will be acceptable:

☐ you electronically scan text/graphics following established procedures

☐ scanned material is accurately inserted into a specified location

☐ scanned material is edited and free of errors

☐ scanned material is saved in an appropriate directory under an appropriate file name

Conditions—How you will be evaluated:

☐ in the workplace or classroom

Linked Core Abilities

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

10. Import files or images from CD-ROM

Criteria—When your performance will be acceptable:

☐ you import graphic from clip art CD-ROM file into a desktop publishing document

☐ you crop and/or resize image imported from CD-ROM

☐ you identify source drive of CD-ROM

Conditions—How you will be evaluated:

☐ in the workplace or using a simulated business situation

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

11. Create a computer-generated calendar

Criteria—When your performance will be acceptable:

☐ you use calendar software package to create a weekly calendar

☐ you use calendar software package to create a monthly calendar

☐ you schedule appointments using calendar software

☐ you revise schedule as needed

☐ calendars contain complete information

☐ calendars contain accurate information

☐ you print calendar

Conditions—How you will be evaluated:

☐ in the workplace or using simulated business situations

Linked Core Abilities

A. Demonstrate basic academic skills

B. Use effective personal and interpersonal skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies

12. Generate complex, multi-part documents

Criteria—When your performance will be acceptable:

☐ you create document using integration

☐ word processed document contains information generated from database, spreadsheet, and/or charting packages

☐ documents contain complete and accurate information

☐ documents meet mailability standards

Conditions—How you will be evaluated:

☐ in the workplace

Linked Core Abilities

A. Demonstrate basic academic skills

C. Apply critical thinking and information processing skills

D. Relate to the complex interrelationships of systems

E. Work with a variety of technologies